

TITAN PLATFORM FOR SALESFORCE

THE CHALLENGE

Titan has multiple products - users can build forms, documents, or websites that integrate with Salesforce. The central login experience before going into each product was disorganized, confusing, and unattractive.

THE SOLUTION

I audited all the existing content and completely reorganized the information architecture to make it easy to navigate and prioritize the most important items. I relied on UX best practices and researched related UX patterns from similar platforms. Then, I brought it to life with the new design system I established for the company.

MY ROLE

Titan never had any UX/UI person before hiring me as Lead Product Designer. My role was to serve as the authority on UX best practices, advocate to the CEO and VP of Product for the best user experience, and translate my ideas into polished mockups ready for handoff.

BACKGROUND

When I joined Titan as its first UX/UI designer, it offered builders for forms, documents, and digital signatures that integrate with Salesforce. The technology was robust, they already had a thousand clients, but the UX/UI was poor.

My first task was to design an entirely new product - a builder for websites - and in the process, completely overhaul the user experience from the previous products and establish a new visual design system.

Titan runs at lightning speed. My deadline was six weeks from starting the job, and despite the challenges that posed, I succeeded - Titan Web had a high quality user experience and professional look.

The problem was, **the user experience between logging into Titan and reaching the web builder was still confusing and unattractive.** I advocated to the CEO that this needed urgent attention.

I got approval to work on a new solution, but not to spend longer than a few days on it. That meant no time for user research. However, relying on my understanding of UX best practices and relevant established design patterns, I knew I could bring our users' home base experience to a professional level, even if it wasn't perfect.

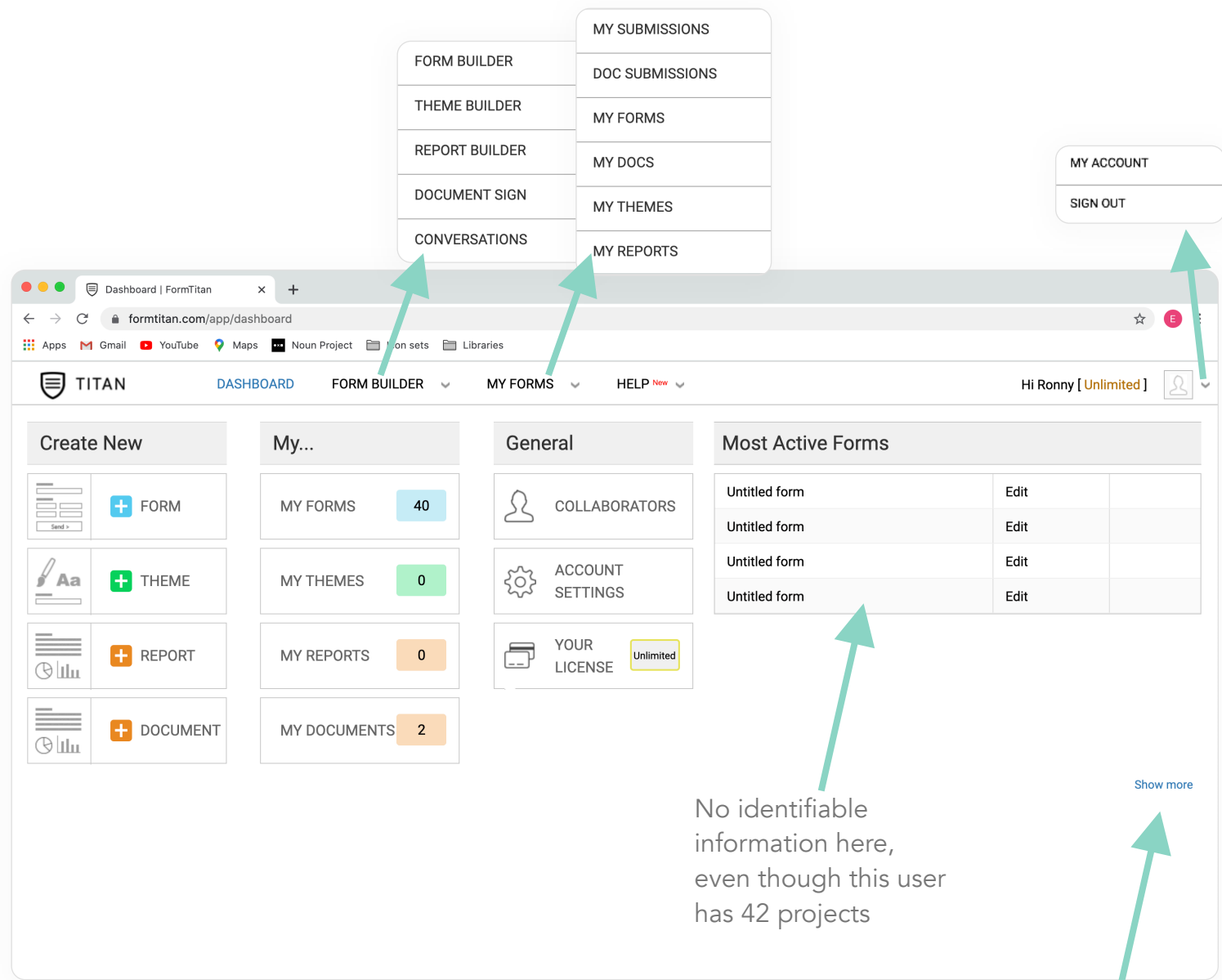
Upon first glance, anyone could see the UI needed a serious renovation, for which I would need to **implement and expand the new design system that I had established for Titan Web.**

But the further I analyzed the existing pages, the more I discovered serious obstacles to usability due to illogical information architecture, lack of prioritization between key content and rarely or never-used content, and a major disconnect from the UX patterns users have come to expect from similar platforms. **I needed not to give the existing system a visual make over, but rather, to craft a completely new approach to the entire user experience.**

DASHBOARD

The dashboard is the first screen users see when they log into Titan. Let's unpack what's here:

- Each product has a button to create a project, and separately, a button to see your projects of that type.
- In the header, Form Builder repeats same actions as the Create New column. My Forms repeats the links from the My... column.
- The header items change based on the last selected item in the dropdown.
- My Account and Account Settings lead to the same place, but have different names.
- Collaborators and Your License are shown as equal level to Account inside of a General category, even though they're part of Account.

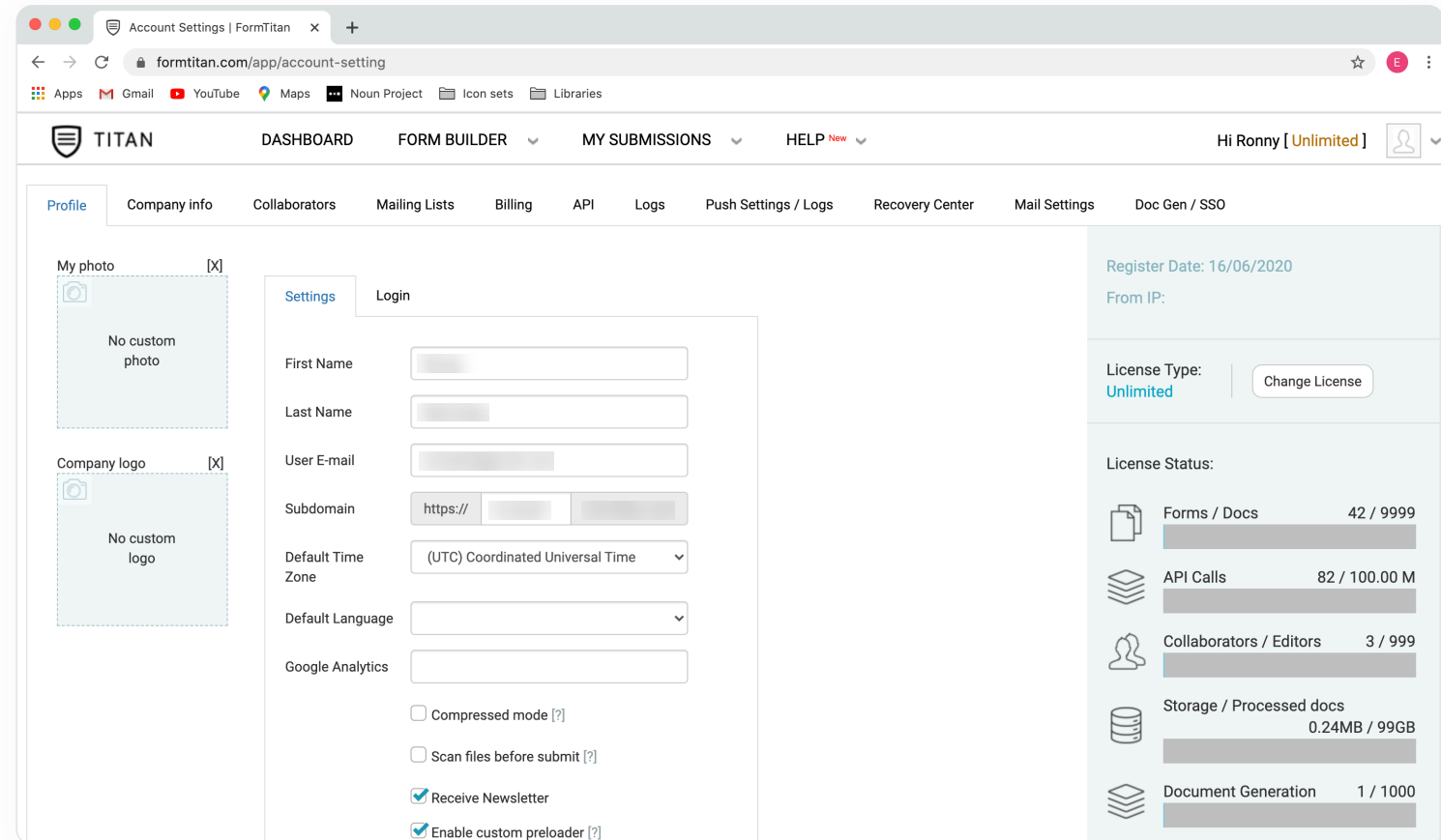


No identifiable information here, even though this user has 42 projects

Not clear at all what this will "show more" of

MY ACCOUNT

- Overwhelming number of tab categories
- Tabs inside of tabs hide information that is important, requiring users to hunt for it
- Extraneous content: for example, we have insights from customer support that users don't add a photo or company logo.
- Misplaced content: for example, Default Language is in Profile, when really it is defined at the level of the company.
- Misleading language: name and email are incorrectly described as settings.
- Advanced and rarely used features compete with key content instead of being disclosed as needed.



NEW ARCHITECTURE

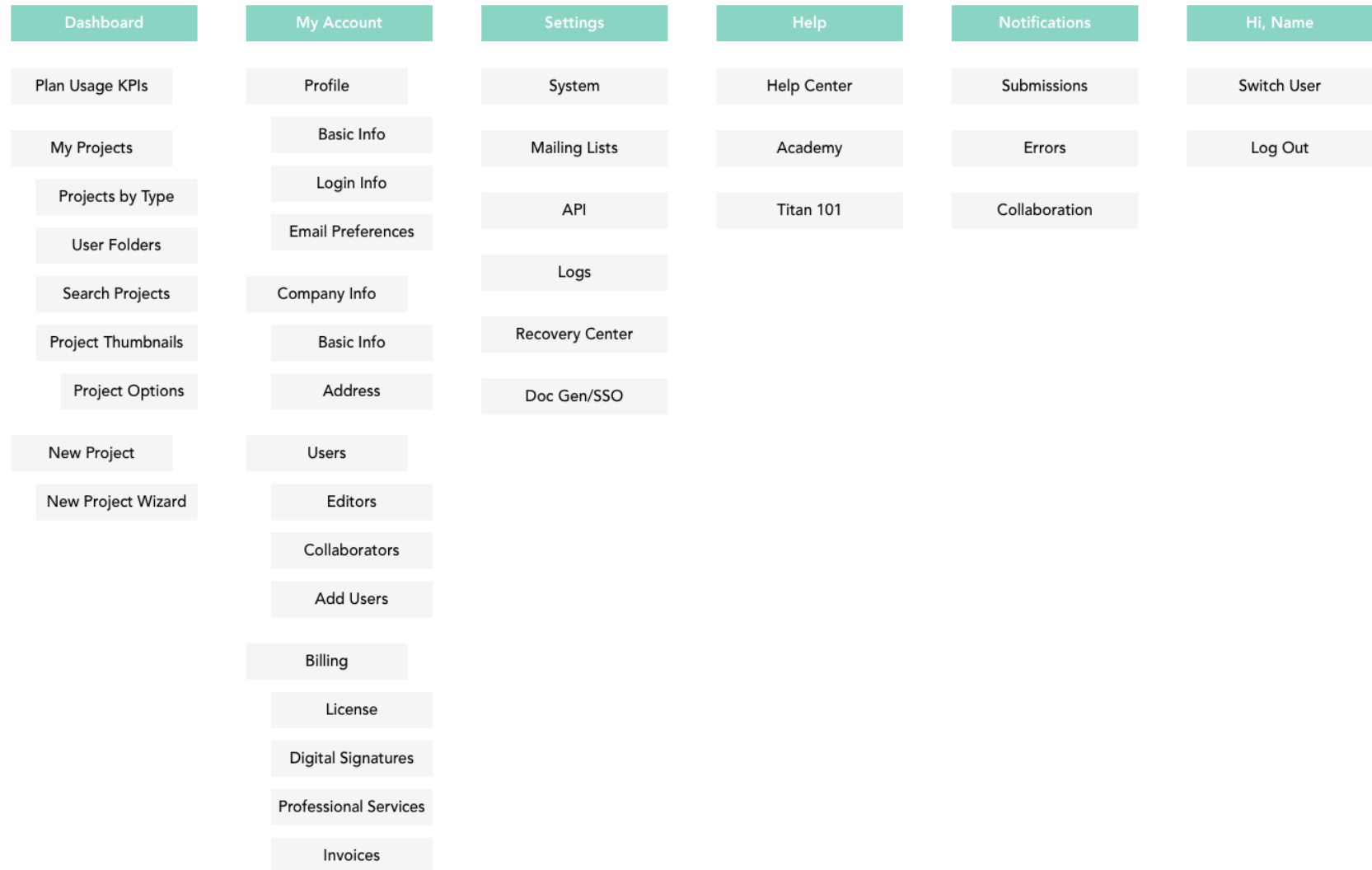
Once I took stock of all the content we needed to offer in Titan's home base, I began reorganizing it.

I made sure the **dashboard presents only the most important content** and removed redundant content.

My Account deserved to be a main menu item, not hidden in a dropdown.

Account had way too many tabs. I split out about half of them into Settings, which more accurately described them.

I added a Notifications section to capture real-time actions like form submissions that were previously lost in a sea of other content.

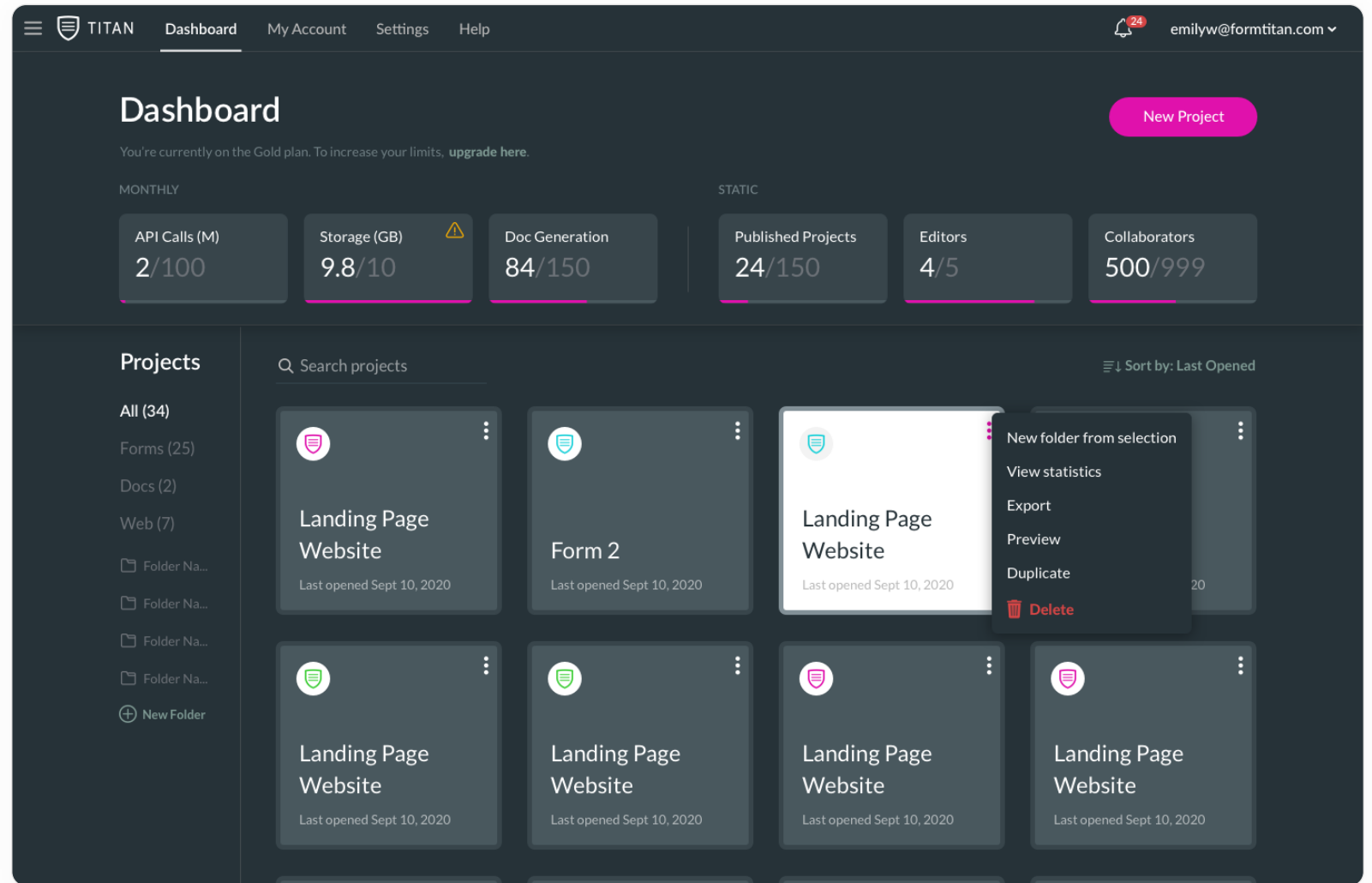


DASHBOARD

The first thing a user sees upon logging in is their plan usage data. Customer support told me **a major pain point is that users are surprised when their plans run out, so I put a data visualization front and center to ensure awareness of usage.**

I chose to present all recent projects directly on the dashboard instead of making users click into each product to see projects. This change **streamlined the most common user flow and made the dashboard look more like a home base.**

Based on user interviews, I knew that it's common to have different types of projects that all surround the same topic, so I **allowed users to create their own cross-product folders.**



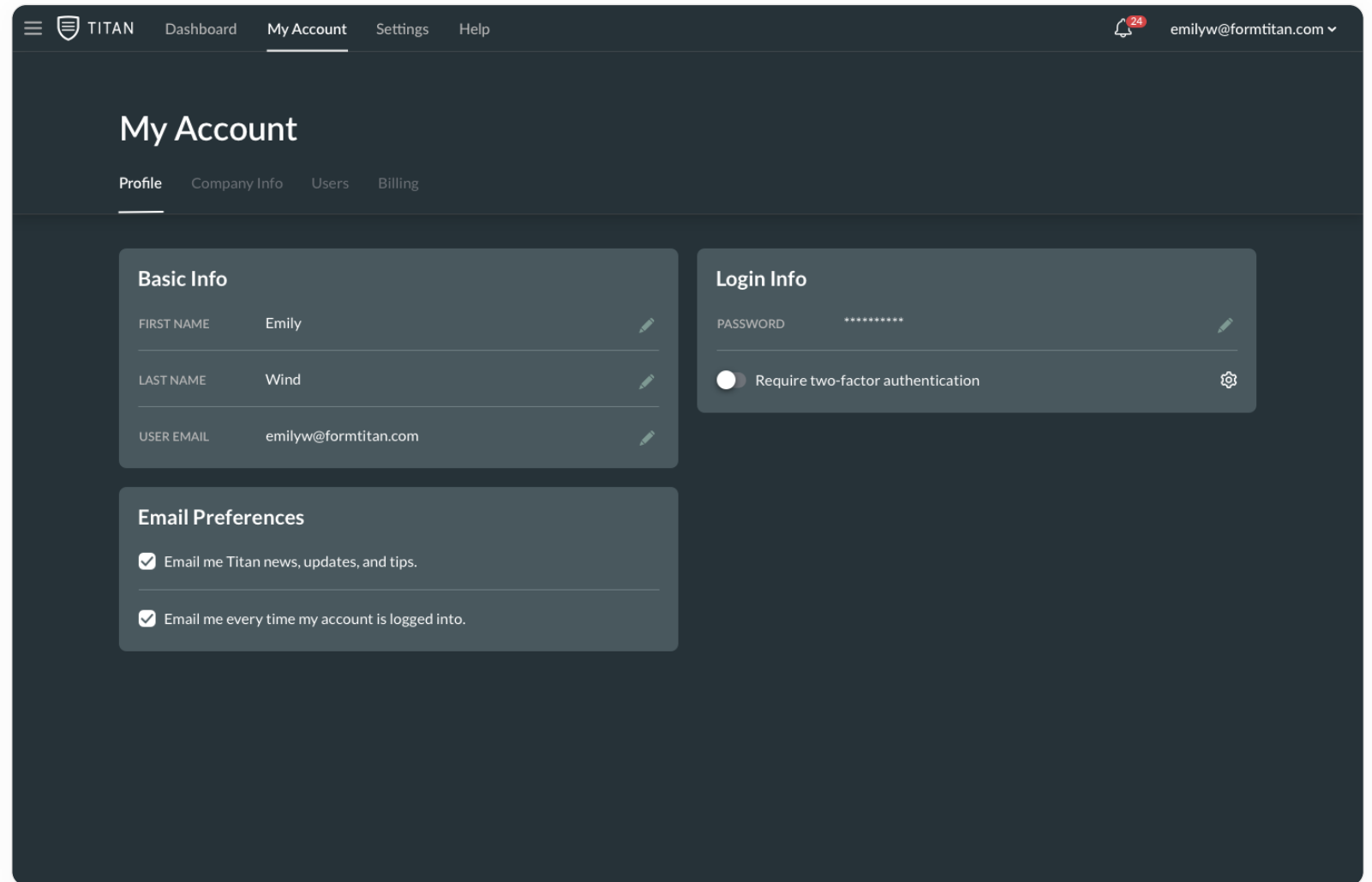
ACCOUNT

In the updated account menu, there are **4 tabs instead of 11**, making it way more digestible.

Whereas previously, each tab included sub-tabs, I chose to **directly display the relevant information divided into blocks with clear titles**. The clear visual hierarchy helps users easily navigate the content.

I **weeded out all the super technical settings that only a small percentage of users need**, pushing them into the Settings tab and reducing clutter.

I **converted jargon and abbreviations to plain English** to increase clarity. For example, "Authenticator 2FA" became "Require two-factor authentication."

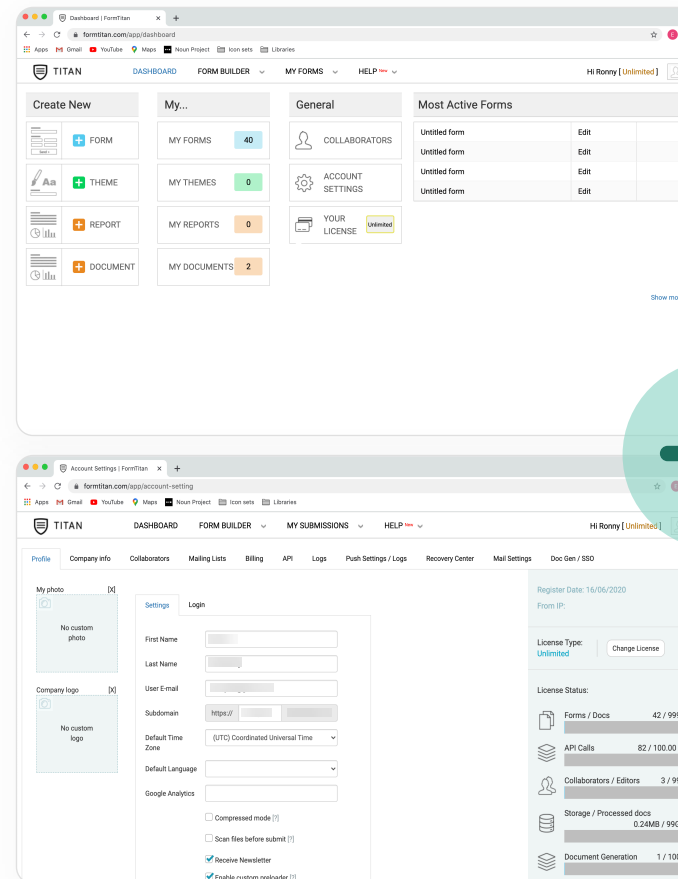


SUMMARY

In less than a week, I managed to transform the Titan home base experience, **giving it the feeling of professionalism and intentionality**. Previously convoluted users flows for key actions like opening existing projects are now readily accessible. Users can easily navigate thanks to logical information architecture, plain language, and strong visual hierarchy.

Although the CEO had not originally viewed the redesign of these screens as a priority, I brought value to the company by advocating for the user experience. Once The CEO saw how this area could be improved, he happily accepted my **recommendations**, on deck to be implemented soon.

BEFORE



AFTER

